AmpliFund Applicant Portal

Contents

Applicant Portal Overview

The **AmpliFund Applicant Portal** allows organizations to submit applications to a funding opportunity. In the Applicant Portal, applicant users are able to complete application forms. Applicants may also add budget and performance plans to submit to the funding organization during the application process. Application forms are configured by the funding organization.

Funding organizations grant access to opportunities with a URL or link. Funders may share an opportunity-specific link with you, or they may provide a link to all of their open opportunities.

Registering on the Applicant Portal

The first time you access an opportunity through the Applicant Portal, you will be prompted to create a login and password. Once you register, you will be able to apply to the opportunity.

To register on the Applicant Portal:

1. Use the **link** the funder provided to access the opportunity.
2. Click on an open **opportunity name**.
3. Click **Apply** to the right of the opportunity name.
4. On the login screen, click **Register.**
5. On the *Create New Account* page, add your **user information**, **contact information**, and **organization information.** All required fields are noted with an asterisk (*).
   Note: If your organization already has an Applicant Portal account, your account administrator has an **Organization Code** that will connect your account to your organization's account.
6. Click **Register**.

Important Note: You cannot register more than one user with the same email address. If you attempt to add more than one user with the email address, you will receive an error message.

Logging In To the Applicant Portal

Once you have registered on the Applicant Portal, use your email and password to log in to the Applicant Portal to access your saved, started, and submitted applications.

To log in to the Applicant Portal:

1. Use the **link** the funder provided to access the opportunity.
2. Click **Log In** in the top-right corner.
3. On the login screen, enter your **Email** and **Password.**
4. Click **Login**.

-- OR --

1. Go to gotomygrants.com.
2. On the login screen, enter your **Email** and **Password.**
3. Click **Login**.

User Menu

Click your email address on the top-right corner of any page to access the User Menu dropdown.

Account Information

On the ***Account Information*** page, users may view and edit their password, contact information, and organization information.

To update your account information:

1. Click your **email address** on the top-right corner of any page.
2. In the dropdown menu, select **Account Information.**
3. On the ***Account Information*** page, click **Edit.**
4. Update the information as necessary.
5. Click **Save & Return**.

Change Password

To change your password:

1. Click your **email address** on the top-right corner of any page.
2. In the dropdown menu, select **Change Password**.
3. Update the information as necessary.
4. Click **Save & Return**.

Log Out

To log out:

1. Click your **email address** on the top-right corner of any page.
2. In the dropdown menu, select **Log Out.**

Users

Applications can be accessed and edited by multiple users.

To invite users to your applicant organization:

1. Open the Applicant Portal.
2. Click the **logo** in the top-left corner of any page.
3. Click **Users**.
4. Click **+ Add User.**
5. Add the user's **Email Address**. ***Important Note:*** You cannot register more than one user with the same email address. If you attempt to add more than one user with the email address, you will receive an error message.
6. Select the user's **Role**.
    - **Administrator:** Administrators can create, edit, delete, and withdraw applications; create and edit accounts; and add new users.
    - **Editor:** Editors can edit applications and update their account settings.
7. In the *Contact Information* section, add the user's **name**, **mailing address**, and **phone number**. Required fields are marked with an asterisk (*).
8. Click **Invite**.

Applying to an Opportunity

Before you can apply to an opportunity, you must register in the Applicant Portal. Once you have registered, you can access the funder's forms, templates, and other information provided. Once you have completed all of the required information, you may submit the application to the funder.

Saving Opportunities

Opportunities can be saved if you want to review the funder's requirements before beginning the application process.

To save an opportunity:

1. Open the **Applicant Portal**.
2. Click an **opportunity name**.
3. On the opportunity details page, click **Save**.

To access your saved opportunities:

1. Open the **Applicant Portal**.
2. Click the **funding organization's logo** in the top-left corner.

Starting an Application

Applications may be started from previously saved opportunities, or may be started directly from the opportunity link after registering.

To start an application:

1. Open the **Applicant Portal**.
2. Click an **opportunity name**.
3. Click **Apply**.

Application Progress

In the **Applicant Portal**, the application progress is displayed at the top of every page. You can also navigate to any page in the application by clicking the icon above the page's name in the progress bar. If a page is required for submission, an asterisk will appear next to the page name in the progress bar.

Icon	Description
○	Incomplete step
◉	Current incomplete step
●	Saved step
✔	Completed step
⦿	Current saved or completed step

Icons

Icons allow users to perform actions. Below are icons you may see in the Applicant Portal.

Icon	Description
+	Create
✎	Edit

🗑	Delete
🖶	Print

Project Information

The ***Project Information*** page allows applicants to add their application information and primary contact information. If the funder requires a Cash Match and/or an In-Kind Match, those amounts added in this section.

To complete the Project Information page:

1. In the *Application Information section*, add the **Application Name.** The application name defaults to the opportunity name.
2. Add the **Total Amount of Award Requested (**optional).
3. Add the **Total Amount of Cash Match** and **Total Amount of In-Kind Match**, if applicable (optional).
4. In the *Primary Contact Information* section, add the application's primary contact **Name**, **Email Address,** mailing **Address**, **City, State**, and **Postal Code** (zip code). The information in this section defaults to the contact information provided by the user who started the application.
5. Add a primary contact **Phone Number** (optional).
6. Click **Save** to save your progress. Click **Mark as Complete** to save the page and mark as complete. Click **Save & Continue** to save your progress and move to the next page. Your information will not be shared with the funding organization until you click **Submit** on the ***Submit*** page.

Application Forms

The ***Application Forms*** page contains a list of customized forms created by funders to capture additional information about applicant organizations, activities, and proposed projects.

To complete an Application Form:

1. On the ***Application Forms*** page, click a **form name**.
2. Add **responses** to the funder's customized form. The form may contain text, multiple choice, or dropdown list questions, or requests for file upload.
3. Click **Save** to save your progress. Click **Mark as Complete** to save the page and mark as complete. Click **Save & Continue** to save your progress and move to the next form or page. Your information will not be shared with the funding organization until you click **Submit** on the ***Submit*** page.

Budget

Depending on the opportunity settings, there may be a ***Budget*** page.

To create a proposed budget line item:

1. On the ***Budget*** page, click the **✚ (Add icon)** next to a budget category name, or click the **✚ (Add icon)** next to *Create New Category*.
2. In the pop-up window, select the line item **Type**.
    - **Personnel Line Item:** budgeted staff compensation expenses.
    - **Non-Personnel Line Item:** budgeted expenses that do not fund staff compensation.
    - **Benefit Type Line Item:** planned benefit expenses for all grant-funded staff.
3. Add the line item **Name.**
4. Add the line item **Description** (optional).
5. Add the Direct Cost.

6. If available, add the percent (in decimal format) of the line item that will be funded by **Cash Match Amount** or **In-Kind Match Amount**. See [Cash Match and In-Kind Match](#) for more information.
7. Click **Save.**

To edit a proposed budget line item:

1. On the ***Budget*** page, click the **(Edit icon)** next to a line item name.
2. In the pop-up window, update the information as necessary.
3. Click **Save**.

To delete a proposed budget line item:

1. On the ***Budget*** page, click the ✖ **(Delete icon)** next to a line item name.

Budget Categories

Funders may provide a standard list of budget categories to use as you complete the template. If there are required categories, they are selectable in the Category dropdown menu. Funders may also allow applicants to create their own budget categories. If this is permitted, a ✚ (Create icon) appears next to the Category dropdown menu.

To create a budget category:

1. In the line item pop-up window, click the ✚ **(Create icon)** next the *Category* field.
2. Add the **category name** in the *Category* field. Click the ✖ **(Delete icon)** to remove.
3. Click **Save.**

Cash Match and In-Kind Match

Funders may have a Cash Match rate and/or an In-Kind Match rate for the opportunity. If the opportunity allows for tracking match, you will see additional fields on the line item to enter match percentages.

To add Cash Match and/or In-Kind Match information:

1. In the line item pop-up window, add the percent (in decimal format) of the line item that will be funded by **Cash Match Amount** or **In-Kind Match Amount**.
2. Click **Save.**

Yearly Allocations

For grant awards projected to span more than one year in length, budget line items may be allocated over multiple grant years. By default, the Budgeted Amount will be spread evenly throughout the life of the line item.

To update a line item's Yearly Allocation:

1. In the line item pop-up window, add **allocation amounts** in the *Grant Year* fields. The *Total Remaining* amount must equal $0.
2. Click **Save**.

Total Proposed Budget

The Total Proposed Budget area populates with totals of proposed budget line items by category. If the funder has Cash Match and In-Kind Match configured for the opportunity, columns will display showing budgeted cash match and in-kind match amounts per budget category.

Performance Plan

Depending on the opportunity settings, there may be a ***Performance Plan*** page. Funders may also include defined programmatic goals for applicants to meet through grant activities. If goals have been pre-defined, they will appear in the goal type dropdown.

To create a proposed performance goal item:

1. On the ***Performance Plan*** page, click **✚ Add Item.**
2. Select a **Goal Type**. The available goal types may vary depending on the opportunity settings. For more details about goal types, see Goal Types.
    a. Milestone goals track completion of grant milestones (i.e. Will you complete X?)
    b. Narrative goals track a narrative response (i.e. How will you complete X?)
    c. Numeric goals track discrete numbers to achieve (i.e. Will you achieve X number?)
    d. Percent Achieved goals track a percent to achieve (i.e. Will you achieve X%?)
    e. Percent Changed goals track a percent increase or decrease (i.e. Will you achieve X% increase?)
    f. Reimbursement goals track discrete units to achieve with a dollar rate per unit (i.e. Will you achieve X units with a reimbursement rate of $Y/unit?)
3. Add a goal **Name**.
4. Add the **goal information**. The fields will vary depending on the goal type.
5. Click **Save**.

To create a proposed milestone goal item:

1. On the ***Performance Plan*** page, click **✚ Add Item.**
2. In the *Goal Type* dropdown, select **Milestone**.
3. Add a goal **Name**.
4. Add the goal **Description** (optional).
5. Click **Save**.

To create a proposed narrative goal item:

1. On the ***Performance Plan*** page, click **✚ Add Item.**
2. In the *Goal Type* dropdown, select **Narrative**.
3. Add a goal **Name**.
4. Add the goal **Narrative** (optional).
5. Click **Save**.

To create a proposed numeric goal item:

1. On the ***Performance Plan*** page, click **✚ Add Item.**
2. In the *Goal Type* dropdown, select **Numeric**.
3. Add a goal **Name**.
4. Add the goal **Number To Be Achieved** (optional).
5. Add the goal **Description** (optional).
6. Click **Save**.

To create a proposed percent achieved goal item:

1. On the ***Performance Plan*** page, click **✚ Add Item.**
2. In the *Goal Type* dropdown, select **Percent Achieved**.
3. Add a goal **Name**.
4. Add the **Desired Percentage** in decimal format (optional).

5. Add the goal **Description** (optional).
6. Click **Save**.

To create a proposed percent change goal item:

1. On the ***Performance Plan*** page, click **+ Add Item.**
2. In the *Goal Type* dropdown, select **Percent Change**.
3. Add a goal **Name**.
4. Add the **Desired Percentage** in decimal format (optional).
5. Add the **Current Percentage** in decimal format (optional).
6. Add the goal **Description** (optional).
7. Click **Save**.

To create a proposed reimbursement goal item:

1. On the ***Performance Plan*** page, click **+ Add Item.**
2. In the *Goal Type* dropdown, select **Reimbursement**.
3. Add a goal **Name**.
4. Add the **Number To Be Achieved** (optional).
5. Add the **Rate Per Achievement** (optional).
6. Add the goal **Description** (optional).
7. Click **Save**.

To edit a proposed performance goal item:

1. On the ***Performance Plan*** page, the **(Edit icon)** next to a goal name.
2. In the pop-up window, update the information as necessary.
3. Click **Save**.

To delete a proposed performance goal item:

1. On the ***Performance Plan*** page, the **✖ (Delete icon)** next to a goal name.

Submit

Once your application has been submitted, you cannot add, edit, or delete any application information. Once you click **Submit,** the funding organization will be notified that your application is ready for review.

To submit your application:

1. On the ***Submit*** page, click **Submit**.

The funder may reopen your organization's application if their review process permits reopening applications. If the funder does reopen your application, you will receive an email notification from no-reply@gotomygrants.com that includes which application has been reopened and a link to access it.

Applications List

The ***Applications List*** contains all applications that an applicant organization has saved, started, or submitted. Applications will appear on the list between the opportunity's Posted Date and Archive Date. After the Archive Date occurs, the application will be removed from the Applications List.

To access the applications list:

1. Click the **organization logo** in the top-left corner of any page.
2. Click **Applications**.

Deleting Applications

Saved (but not submitted) applications may be deleted by the applicant. Once deleted, applications will no longer be accessible.

To delete applications:

1. Click the **organization logo** in the top-left corner of any page.
2. Click **Applications**.
3. Click **(Delete icon)** next to an application name.
4. In the confirmation pop-up window, click **Delete.**

Goal Types

Goals may be quantified using six different types. The goal types allow staff to track progress based on the planned item.

Milestone goals are the most basic goal type. They allow for tracking progress as a "Yes" or "No" response by the responsible staff member. An example of a milestone goal is "Create and send Q1 Staff Survey."

Narrative goals are question and answer goals. Responsible staff members may answer the question posed by the goal. An example of a narrative goal is "How successful was the grant-related activity this period?"

Numeric goals are a discrete number to achieve. As units of the goal are completed, staff may record units completed. An example of a numeric goal is "number of program participants" with a goal target of 50.

Percent achieved goals are goals to reach a desired percent. When tracking progress against a percent achieved goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent achieved goal is "Volunteer Retention Rate" with a goal target of 70%.

Percent change goals are goals to track a percent increase or decrease. Percent change goals are defined with a starting percent and a desired percent. When tracking progress against a percent change goal, staff may capture Total Possible and Total Achieved percentages. An example of a percent change goal is "Decrease in Student Absences" with a starting absentee rate of 10%, and a goal absentee rate of 3%.

Reimbursement goals are goals with a discrete unit to achieve, and a dollar rate associated per unit. When tracking progress against a reimbursement goal, staff may enter Units Achieved. An optional checkbox field appears on each reimbursement goal type labeled "Add as budget item." If the goal is added as a budget item, the reimbursement goal will appear as part of the grant's expense budget. If a reimbursement goal is shown on the grant budget, any updates made to the goal through the performance plan will automatically update the budget. An example of a Reimbursement goal is "Number of Patient Screenings" with target/maximum units of 100, and a reimbursement rate per unit of $22. Reimbursement goals are used to support pay for performance grants.